



FINANCIAL  
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ASSOCIATION

# Take 5

July 2024

An update on the programs and services that make FPA *your partner in planning*<sup>™</sup>



## See Daniel Pink Headline FPA Annual Conference 2024

For the last two decades, Daniel Pink's books have helped individuals and organizations around the world rethink how they live and operate. His deeply researched works on business, creativity, and behavior have won multiple awards. And you have a chance to see Daniel Pink up close and personal at [FPA Annual Conference 2024](#) in Columbus from September 18-20! Join us for an unforgettable experience when Daniel Pink explores his ideas for creating a path to a good life.

[Register today to take advantage of the lowest currently available registration rates!](#)

## Live Webinar: Understanding the Impact of the DOL's Retirement Security Rule

The Department of Labor has released a highly anticipated new regulation that defines who is considered an investment advice fiduciary. In addition, new amendments to the department's exemptions governing the conditions imposed on how investment advice fiduciaries may be paid are also set to be implemented. While these changes are currently facing significant challenges in two courts, they are expected to significantly impact the retirement investment advice industry if they survive. Join us on July 10 at 2:00 p.m. ET for a [live webinar event](#) with respected ERISA attorney Marcia Wagner of The Wagner Law Group when she uncovers what you need to know. [Register now!](#)

## FPA and Money.com's Best Financial Planners: Complete the Questionnaire!

Don't miss out on the opportunity to showcase your expertise as a top financial planner to millions of potential clients! FPA and Money.com are jointly conducting a [questionnaire](#) to identify the best financial planners. This opportunity is exclusively available to CFP® professional FPA members, and your submission deadline is July 17. Because a scoring methodology will be developed by Money.com, simply completing the questionnaire does not guarantee inclusion, but it is a great opportunity to potentially highlight your hard work as a financial planner. The official unveiling of the Best Financial Planners list will take place at FPA Annual Conference 2024 in Columbus, Ohio, from September 18-20. [Complete the questionnaire now!](#)

## The July Journal of Financial Planning Is Now Available

FPA Members can now read the July 2024 issue of the *Journal of Financial Planning* to learn about reverse mortgages, continuity planning, future considerations of the SECURE 2.0 Act, finding a good business partner, retirement planning, behavioral biases in insurance planning, and much more. Access the latest issue of the [Journal now.](#)



## Apply for the Richard B. Wagner Scholarship for 2024 Fall Residency

FPA is now accepting applications for the [Richard B. Wagner Scholarship](#) to attend the 2024 Fall Residency Program. This scholarship, jointly established by FPA and the CFP Board Center for Financial Planning in honor of Wagner's legacy, enables qualified individuals from underrepresented populations to complete the education requirement for CFP® certification or to continue their education through FPA professional development programs. [Submissions are due July 12—act fast!](#)

## Propel Your Business Forward with the FPA Business Hub

Are you eager to propel your business to greater heights? Stay ahead of the competition with the FPA Business Hub, a powerful resource delivering a gold mine of insights and expertise from industry leaders. Whether you want to grow your business, refine your service offerings, or build your team, the FPA Business Hub has the resources to help you achieve your goals. [Stay ahead of the curve—explore the FPA Business Hub today.](#)

## The 2023 FPA Annual Report

Over the past year, FPA leaders and staff worked hard to make the Association your partner in planning through Practice Support, Learning, Advocacy, and Networking. Learn about those efforts and the many programs, services, and events that are driving the value of membership in the recently released 2023 FPA Annual Report. The report looks at how FPA works for you and includes an update on membership and the 2023 audited financial statements. [Read the 2023 FPA Annual Report now.](#)

## Inside Information Survey on Advisory Fees

Bob Veres at Inside Information is surveying the financial planning community about their revenue models to identify trends in advisory fees. He's collecting data on whether you primarily charge via AUM, hourly, flat fee monthly, or quarterly, whether you've changed revenue models in the past five years, whether you're adding fees for specific additional services not covered under the primary fee model, whether you charge for the initial financial plan, and whether that fee is rebated if the prospect becomes an AUM client. The survey takes 11 minutes, and responses are due by August 15. A final report will be available to the entire FPA community. [Take the survey!](#)



**Support the Advancement  
of Your Profession**

The [FPA Political Action Committee \(FPA PAC\)](#), the only PAC focused on advancing the financial planning profession, provides an important seat at the table, forges relationships with lawmakers and their staffs, and provides an opportunity to share the financial planning story. There is much work to do and every dollar counts. To help us fight for your profession, we ask you to make a contribution to support your FPA PAC. Whether you contribute \$50 or \$5,000, every dollar is appreciated and will support advocacy efforts that move your profession forward.

**[DONATE TODAY!](#)**





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# PARTNER SPOTLIGHT

## FINANCE OF AMERICA REVERSE LLC

Finance of America Reverse and FPA have formed an impactful partnership to educate financial planners about the potential benefits of reverse mortgages as part of a comprehensive financial plan. As the largest reverse mortgage lender in the U.S. and a leading provider of retirement solutions, Finance of America Reverse and its experts have joined forces with FPA to support you.

Finance of America Reverse and FPA believe financial planners must continually question, adapt, and develop new ways to serve their clients' best interests and transform lives through comprehensive financial planning. This partnership aligns with your aspiration to be a modern, forward-thinking financial planner.

As an FPA Member, you can take advantage of the following benefits today:

- **The Finance of America Reverse Learning Hub:** Access this [dedicated resource](#) via the FPA online learning platform, granting you instant access to various courses, case studies, and more.
- **Finance of America Reverse Educational Resources:** Explore a variety of [knowledge and innovative tools](#) available through the FPA Business Hub. These resources are specifically tailored to optimize client retirement outcomes.

LEARN MORE!



**STEVE RESCH**

Vice President, Retirement Strategies  
Finance of America Reverse

"Our goal is to educate you about utilizing home equity to safeguard and enhance a comprehensive retirement plan. We invite you to join one of our complimentary webinars or contact us today. Our reverse mortgage calculator can visually model the life of a reverse mortgage loan for your client, providing valuable insights and planning support."